



Social Security Scotland
Tèarainteachd Shòisealta Alba

Social Security Scotland Client Panels research: Web chat





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1. Executive Summary

From November 2021 to January 2022, Social Security Scotland's Client Panel members were invited to a survey about Social Security Scotland's web chat service. The survey included questions about experiences of using the service and ideas for future improvements. In total, 170 members completed the survey. This report details the findings and key themes that emerged from this work. Below is a summary of these findings.

Around half of respondents (47%) hadn't heard of the web chat service. Only 25 respondents (15%) said they had used the service. All rated their overall experience as 'good' or 'very good'. All said it was likely or very likely that they would use web chat if they had to contact Social Security Scotland again in the future. All, or all but one, said: it was clear they were chatting with an adviser and not an automated bot; they felt confident sharing personal information in the chat; and were treated with dignity, fairness and respect. One respondent said the adviser they chatted with wasn't knowledgeable. Two respondents said their query wasn't resolved during the chat.

Around two thirds (67%) of those who hadn't used or heard of the service said they were likely or very likely to use web chat in the future. Over a third (35%) said they would always use web chat as their preferred way to get in touch with Social Security Scotland.

Most who hadn't used the service but would in the future said they would want to use web chat to get advice or general information (84%) and to update their details (73%). Most said information about web chat should be available in these places: on the website (90%); on letters (69%); and given during the application process (56%).

Only 13% of respondents said they were unlikely or very unlikely to ever use the service. The most common reason given by these respondents was that they prefer to communicate with Social Security Scotland in a different way (e.g. phone).

Respondents gave a range of suggested improvements to the service. These included:

- Adding 'other' to the range of options for starting a chat on the mygov.scot homepage.
- More information about the adviser in the web chat window such as an identification or staff number and working location.
- A button to make a comment, a complaint, or request a call back in the chat window.
- An estimated waiting time for an adviser.
- A button or information on how to obtain a transcript of the chat.

2. Background and methodology

2.1. Background

There are a range of ways for clients to get in touch with Social Security Scotland. The web chat service was introduced in April 2020, in response to the Coronavirus (COVID-19) pandemic.¹ Members of the public can chat with an adviser via the mygov.scot webpage. Operating hours are Monday to Friday from 8am to 6pm.² Advisers can provide assistance about the range of benefits delivered by Social Security Scotland.

This research was the first to specifically explore experiences of and views about the web chat service. Previous Client Panels and Experience Panels research has covered more general attitudes towards web chat and broader communication preferences.³

¹ 'A further way for our clients to contact us', Social Security Scotland: <https://www.socialsecurity.gov.scot/news-events/news/a-further-way-for-our-clients-to-contact-us>

² Contact Social Security Scotland: <https://www.mygov.scot/contact-social-security-scotland>

³ See: [Social Security Experience Panels: inclusive communication - report - gov.scot \(www.gov.scot\)](#) and [Social Security Experience Panels - appointments and local delivery: report - gov.scot \(www.gov.scot\)](#) and [Social Security client and experience panels research: effects of the coronavirus pandemic on communication preferences - gov.scot \(www.gov.scot\)](#)

2.2. Methodology

Established in 2020, the Client Panels are made up of Social Security Scotland clients from across Scotland. Research with Client Panel members explores what people's experience of Social Security Scotland has been like. The research informs decisions about Social Security Scotland's systems, processes and policies.

From November 2021 to January 2022, all members of the Client Panels were invited to take part in a survey about web chat. The survey asked questions about knowledge of and experiences using the web chat service and ideas for future improvements.

Participation in all Client Panels research is optional. In total, 170 panel members completed the survey. This represents a response rate of 9%. There are different ways to get in touch with Social Security Scotland and Client Panel members likely have different communication preferences. It's likely that those members who are interested in web chat were more likely to take part.

The results presented in this report only represent the views of the Client Panel members who took part in the project. Results should not be interpreted as generalisable for Social Security Scotland's current or future client base as a whole. Results presented in tables use percentages to show proportions between different answer options. Where the total number of responses is below 50, whole numbers are used instead. The number of respondents answering a question is shown in the title of the table as (n).

Quotations are taken from comments left by respondents in open-text questions and have the label (survey respondent). Edits to spelling and grammar were made as appropriate.

Where possible, information from the survey was matched to demographic information supplied previously by panel members. Linking was not possible where there was missing or unclear information. The following demographic information is included to give context to the findings from the survey.

Almost three quarters (73%) of respondents were women. Around half (54%) of respondents were aged between 35 and 54. The majority (85%) live in an urban area. Around two in five (43%) have a physical or mental health condition. Two thirds (66%) have caring responsibilities. Most respondents (89%) are white. Over half (53%) had received Carer’s Allowance Supplement. Around a third (38%) had received Best Start Foods/Grant or Scottish Child Payment. Further demographic information about the respondents can be found at Annex A.

3. Experiences with the web chat service

At the beginning of the survey, respondents said if they had used or heard of the web chat service (Table 3.1).

Table 3.1: Had you previously heard of the Social Security Scotland web chat service? (n=169)

Response options	
Yes and I have used it	15%
Yes but I've never used it	38%
No	47%

Around half of respondents (47%) hadn’t heard of the web chat service. Just more than a third (38%) said that had heard of the service but never used it. Only 25 respondents (15%) said they had used web chat. The next section covers the feedback from these respondents about their experience.

3.1. Respondents who had used web chat

Detailed figures about the characteristics of those who had used web chat are not included in this report due to small numbers. However, the following overview helps contextualise the feedback. Of those respondents who had used web chat, most were women and most were aged between 35 and 44. There was a roughly equal number who had and did not have a mental or physical health condition.

Six of the users used web chat to get in touch about Best Start Foods/Grant. Six got in touch about Carer's Allowance Supplement and six about Scottish Child Payment. The most frequent reason for getting in touch was for advice or general information (9 of 25). Other reasons for starting a web chat were: to ask about the progress of an application or to ask about a payment.⁴

Almost all (22 of 25) said that they chose to use web chat as it was the most convenient way to get in touch. Two users said that they used web chat as other contact methods (e.g. phone) weren't available.⁵ Due to the COVID-19 pandemic and the rapid move to home working, Social Security Scotland stopped receiving inbound phone calls in March 2020. A temporary telephone call-back system was put in place in April 2020. This allowed clients to request a client advisor to return their call. From July 2020, there was a gradual return of Social Security Scotland's telephony service.

3.2. Overall experiences

All respondents who had used web chat rated their overall experience as 'good' or 'very good'. All said it was likely or very likely that they would use web chat if they had to contact Social Security Scotland in the future.⁶

⁴ Full results of these questions are provided in Tables B1 and B2 in Annex B.

⁵ Full results of this question are provided in Table B3 in Annex B.

⁶ Full results of these questions are provided in Tables B4 and B5 in Annex B.

Almost all (22 out of 25) said it was easy or very easy to find the mygov.scot web page to start a chat.⁷ Three of these respondents left comments which specifically mentioned how easy they found it to start a chat.

“Everything was clear on the website.” **Survey respondent**

“It [was] easy to access and got someone quickly to sort my problem out.”
Survey respondent

Respondents were asked how much they agreed or disagreed with five statements about their experience (Table 3.2).

Table 3.2: Statements about experience (n=19-25)

	Strongly agree/ Agree	Neither agree nor disagree	Disagree/ Strongly disagree
It was clear I was chatting with a human and not a bot	22	0	0
I felt confident that it was safe to share personal information in the chat	24	1	0
I was treated with dignity, fairness and respect	18	1	0
The web chat adviser was knowledgeable	21	1	1
My query was resolved without having to contact again or in a different way (e.g. by phone)	20	1	2

Almost all agreed or strongly agreed with each of the statements. All, or all but one, said: it was clear they were chatting with an adviser and not an automated bot; they felt confident sharing personal information in the chat; and were treated with dignity, fairness and respect. One respondent said the adviser they chatted with wasn't knowledgeable. Two respondents said their query wasn't resolved during the chat.

⁷ Full results of this question are provided in Tables B6 in Annex B.

Respondents left comments with positive feedback about other aspects of their experiences. These were: receiving a quick response; the service was easy to use; the adviser was friendly; and web chat is faster than phone.

“I got connected really easily. It was easy to use and a great additional service which I find the best for me personally to use.” **Survey respondent**

“Great help in minutes.” **Survey respondent**

“It is very easy to use and very nice people write back who try to help and advise me, I am very happy.” **Survey respondent**

“It's a great option and saves time. Phone queues can be long and web chat is faster.” **Survey respondent**

One respondent mentioned a long wait time to start the chat. One respondent said their query wasn't resolved and had to wait for a letter for an answer.

“Sometimes you don't get the answer you're looking for and sometimes long wait times.” **Survey respondent**

“To be given an answer about the situation rather than having to wait for a letter.” **Survey respondent**

4. Views of respondents who hadn't used web chat

4.1. Likely use of web chat

Just less than half of respondents (47%) said they hadn't used or heard of Social Security Scotland's web chat (Table 3.1). These respondents were asked how likely they were to use the service in the future (Table 4.1).

Table 4.1: How likely are you to use the web chat service in the future?
(n=144)

Response options	
Very likely	30%
Likely	37%
Neither likely nor unlikely	20%
Unlikely	9%
Very unlikely	4%

Around two thirds (67%) of those who hadn't used or heard of the service said they were likely or very likely to use it. One in five (20%) said they were neither likely nor unlikely. Only 13% of respondents said they were unlikely or very unlikely to ever use the service. The most common reason given by these respondents was that they prefer to communicate with Social Security Scotland in a different way (e.g. phone). A couple of respondents also said they had concerns about the safety of their personal information via web chat.⁸ It is important to note that overall, Client Panel members who aren't interested in web chat may have been less likely to take part in the survey.

⁸ Full results of this question are provided in Table B7 in Annex B.

The next section covers the views of respondents who said they may use the web chat service in the future.

4.2. Using web chat

Respondents were asked what types of things they would want to do via web chat (Table 4.2).

Table 4.2: What would you want to use the web chat service for?* (n=124)

Response options	
To get advice or general information	84%
To update my details or advise a change in my circumstances	73%
To check if I was eligible for a benefit	62%
To ask about the progress of an application	60%
To ask about a payment	56%
To make an application	50%
To find out how to challenge a decision on an application	35%
Other	5%

*Respondents could choose multiple answers.

Most respondents said they would want to use web chat to get advice or general information (84%) and to update their details (73%). Around a third (35%) said they would want to use web chat to challenge a decision. One respondent said they would use web chat for any kind of contact with Social Security Scotland. One said that they would use web chat if they were unable to speak to an adviser on the phone.

These respondents were then asked if there was anything they wouldn't want to do or discuss via web chat. The main themes that emerged were actions relating to submitting applications or challenging a decision. Some also said that they wouldn't use web chat to: make a complaint; update their details; discuss payments or financial details. A couple of respondents said they would prefer a different contact method for any situation where they would like a copy or a confirmation for their own records.

"I think that for applications web chat would probably more time consuming and would lead to forgetting to provide information or incomplete information. To challenge decisions, it would be good to start the appeal but need to be followed up by detailed information either by email or post, same for applications." **Survey respondent**

"Possibly to try to fix any payment mistakes I would rather talk to an adviser." **Survey respondent**

"If I was querying a benefits decision I'd almost certainly prefer to put my query in writing and send it by post to be signed for, so I'd have proof positive that you received it. In all honesty I'd probably want to do the same if submitting an application for a benefit I believed I was eligible for. Hard copy is still the safest to keep copies of important/legal documents." **Survey respondent**

Respondents were asked where they would like to see information on how to start a web chat (Table 4.3).

Table 4.3: Where should Social Security Scotland give information about how to start a web chat?* (n=124)

Response options	
On the Social Security Scotland website	90%
On letters from Social Security Scotland	69%
When I make an application	56%
On social media (Facebook/Instagram)	48%
An automated message on the telephone line	40%
Other	4%

*Respondents could choose multiple answers.

Almost all (90%) said information about web chat should be on the Social Security Scotland website. Over half said information should be on letters from Social Security Scotland (69%) and given during the application process (56%). Other suggestions given by respondents were: adverts on radio, television, and in newspapers; at GP surgeries; and on posters.

Respondents also said how often web chat would be their preferred way to get in touch (Table 4.4).

Table 4.4: How often would web chat be your preferred way to get in touch?
(n=124)

Response options	
Always	35%
Sometimes	53%
Rarely	11%

Over a third (35%) said they would always use web chat as their preferred way to get in touch with Social Security Scotland. It's important to remember that these questions were asked of respondents who hadn't heard of or used the service before. Over half (53%) said they would use web chat sometimes as their preferred method. Around one in ten (11%) said web chat would only rarely be their favoured way to get in touch.

5. Improvements

5.1. Homepage

Both respondents who had used web chat and those who might use it in the future were asked about improvements to the service. Respondents were shown an image of the web chat homepage hosted on mygov.scot. The image can be seen at Annex C. A link to the page was also included to allow respondents to visit the page if they wished to do so. We asked respondents if there was any other information it would be helpful to include on the page.

Two respondents who had used the service said it was difficult to start a chat and hard to find the homepage. One said they used a search engine to find the page. On the instruction page, one respondent said it would be useful to include a space to state the reason for the chat.

“I found it hard to find on your website and found I had to Google, Social Security Scotland web chat to find it.” **Survey respondent who has used web chat**

“It is not immediately apparent on all pages.” **Survey respondent who has used web chat**

A few respondents left comments about the drop down box which asks which benefit the user wants to discuss. Respondents said it was important that this included an option to choose ‘other’. One respondent said that drop down options can be difficult to use on a mobile.

“As long as the drop box has “other” as subject it looks fine. The drop down box is unlikely to list every issue someone has.” **Survey respondent who has used web chat**

Other suggestions for information it would be helpful to have on the homepage were:

- Advice on the best method of contact for different purposes and the types of queries that web chat advisers can help with.
- Information on who else can see the chat and about data security.
- A tool to check entitlement to different benefits.

“Give information on which options are best for certain situations, i.e. application progress - web chat, make a complaint - call.” **Survey respondent who hasn’t used web chat**

“A reminder on every page about which Social Security [Scotland] benefits can be discussed using web chat.” **Survey respondent who hasn’t used web chat**

“Will the chat be saved, and if so where? Who else will access the chat [and] are my details kept private?” **Survey respondent who hasn’t used web chat**

“You might want to add a warning that chats will be terminated if people are just making cheeky or abusive remarks. Also remind people that it is not for frivolous chat and is only for genuine issues.” **Survey respondent who has used web chat**

5.2. Chat window

As with the web chat homepage, respondents were shown an image of the chat window and asked if there was anything else it would be helpful to include. In the example, the adviser was called Alan. The image can be seen at Annex C.

The only suggestion from those who had used the service was from one respondent who said the button to send a message should be easier to use.

Among respondents who hadn’t used the service, the most frequent suggestion was for more information about the adviser. These included:

- An identification or staff number
- Surname
- Job role
- A picture
- Information about the adviser’s supervisor
- Working location (which city and whether in an office or at home).

“Maybe a picture of the staff member to make it more personal.” **Survey respondent who hasn’t used web chat**

“An ID number for 'Alan' to track and identify any issues on the user's behalf.”
Survey respondent who hasn't used web chat

“Would it be possible to attach a unique number to each adviser to give customers a 'go to' and allow them to refer later to whom they spoke, if required?”
Survey respondent who hasn't used web chat

“Possibly the area he [the adviser] is in. What his position and location is in case of queries you can then say 'I spoke to Alan at Aberdeen office.’”
Survey respondent who hasn't used web chat

Other suggestions for the chat window were:

- A button to make a comment, a complaint, or request a call back
- A reference number or code for the chat
- The time and date
- Wait times for replies
- A reminder to have personal details and information ready and not to share bank details in the chat
- A prompt to type in the box.

“A button to comment or complaint.”
Survey respondent who hasn't used web chat

“A request a call back button.”
Survey respondent who hasn't used web chat
“Maybe a reference number for the chat? This might help for any follow-up queries that were needed, or if the applicant needed to refer to the specific chat?”
Survey respondent who hasn't used web chat

“Reminder not to provide bank account details or other information that should not be provided on the chat. Prompt to type message in box provided.”
Survey respondent who hasn't used web chat

5.3. Additional functions

In the future, Social Security Scotland may add further functions to the web chat service. Respondents who have used web chat, or may use it in the future, were asked to rank four additional functions from most to least important. Table 5.1 shows the results of this question.

Table 5.1: Ranking of additional functions (n=103-115)

Functions	Rank
An estimated waiting time to chat to an adviser	1
A button to request a copy of the chat transcript	2
Ability to adapt the chat window e.g. move the window or change the colour of text	3
An automatic survey to give my feedback about the chat	4

An overall total was calculated for each of the features. Of the four features, an estimated waiting time for an adviser was ranked overall as the most important. This was followed by a button to request a copy of the chat transcript. The remaining two features were ranked almost equally. These were the ability to adapt the chat window and an automatic survey to provide feedback at the end of a chat.

In their comments, a number respondents requested a button or information on how to obtain a transcript of the chat. A couple of respondents said a function to allow the upload of documents or images would be helpful.

“How to save a chat for future reference.” **Survey respondent who has used web chat**

“Some online chats I’ve used before have a button where you can request the chat transcript to be emailed to you or downloaded or printed once finished. I



would prefer to see this if I was using the chat facility so I could keep a copy of the chat for my own records.” **Survey respondent who hasn’t used web chat**

“Perhaps a button to add an image. For instance a letter that has been received by the member of public. Or for the chat staff to send helpful screenshots for the customer so they can see what the advisor is meaning.” **Survey respondent who hasn’t used web chat**

A couple of respondents suggested that information on how the chat could be adapted for clients with accessibility needs would be helpful.

“If the client advisor knows that the client is visually impaired [or] has dyslexia then it might be best to offer or adjust the colour and font size before the chat begins [or] ask the question: ‘How is this chat visually or would you prefer audio described voice interaction?’ If they have difficulty reading the messages or are assisted greatly by text and speech, some prefer to have sound and read to ensure better comprehension of the conversation. It just gives more options [and] helps with reassuring the client that they are heard of the interaction to make it as seem less and helpful and stress free as possible.” **Survey respondent who hasn’t used web chat**

“Accessibility features like changing the text size.” **Survey respondent who hasn’t used web chat**

One respondent said it would be helpful if the chat could be paused and started again without requiring the user retyping information or questions.

“That people can take a break and come back to the chat later if they wish or need. Reassure them that there is no time limit on them, and they can come and go, without having to repeat themselves each time.” **Survey respondent who hasn’t used web chat**

6. What's next?

Social Security Scotland will continue to work with the Client Panels to make sure the social security system works for the people of Scotland.

The findings have been shared with leaders who manage the web chat service. They were pleased with the positive experiences reported by respondents and are making plans to share and celebrate this within their teams and across the organisation.

The findings will also be used in decision-making about how to develop the service. This will include how to increase the awareness of, and promote, the web chat service to clients. Feedback about the homepage and chat window, as well as ideas for additional functions will also be used to decide on and prioritise improvements. Design and delivery teams in Social Security Scotland and the Scottish Government will do this when planning for the future of the service.

7. Annex A: Survey respondent characteristics

Table A1: Gender

Response options	All respondents (n=153)
Men	27%
Women	73%

Table A2: Age

Response options	All respondents (n=139)
Under 25	*
25-34	15%
35-44	31%
45-54	23%
55-64	19%
65+	*

*Suppressed due to low numbers.

Table A3: Geographical location

Response options	All respondents (n=149)
Urban	85%
Rural	15%

Table A4: Disability

Response options	All respondents (n=154)
Has a physical or mental health condition	43%
No condition	54%
Prefer not to say	3%

Table A5: Caring responsibility

Response options	All respondents (n=154)
Has caring responsibilities	66%
No caring responsibilities	*
Prefer not to say	*

*Suppressed due to low numbers.

Table A6: Ethnicity

Response options	All respondents (n=153)
White	89%
Minority Ethnic	*
Prefer not to say	*

*Suppressed due to low numbers.

Table A7: Respondents' benefit experience (n=150-154)

Response options	
Best Start Foods/Grant	38%
Carer's Allowance Supplement	53%
Child Winter Heating Assistance	9%
Funeral Support Payment	3%
Scottish Child Payment	38%
Young Carer Grant	*

*Suppressed due to low numbers.

8. Annex B: Tables

Table B1: Which benefit did you get in touch about? (n=25)

Response options	
Best Start Foods or Best Start Grant	6
Carer's Allowance Supplement	6
Child Winter Heating Assistance	2
Scottish Child Payment	6
Young Carer Grant	1
More than one benefit	1
I don't know / can't remember	3

Table B2: What was the purpose of your web chat? (n=25)

Response options	
To get advice or general information	9
To ask about the progress of an application	6
To ask about a payment	4
To check if I was eligible for a benefit	2
To update my details or advise a change in my circumstances	2
Other	2

Table B3: Why did you choose web chat as they way to get in touch? (n=25)

Response options	
It was the most convenient way to get in touch	22
Other contact methods (e.g. phone) were not available	2
I don't know	1

Table B4: Overall how would you rate your experience with the web chat service? (n=24)

Response options	
Very good	18
Good	6

Table B5: If you had to contact Social Security Scotland again in the future, how likely are you to use the web chat service? (n=24)

Response options	
Very likely	20
Likely	4

Table B6: How easy or difficult was it to find the web page to start a chat?
(n=25)

Response options	
Very easy/easy	22
Neither easy nor difficult	1
Difficult/very difficult	2

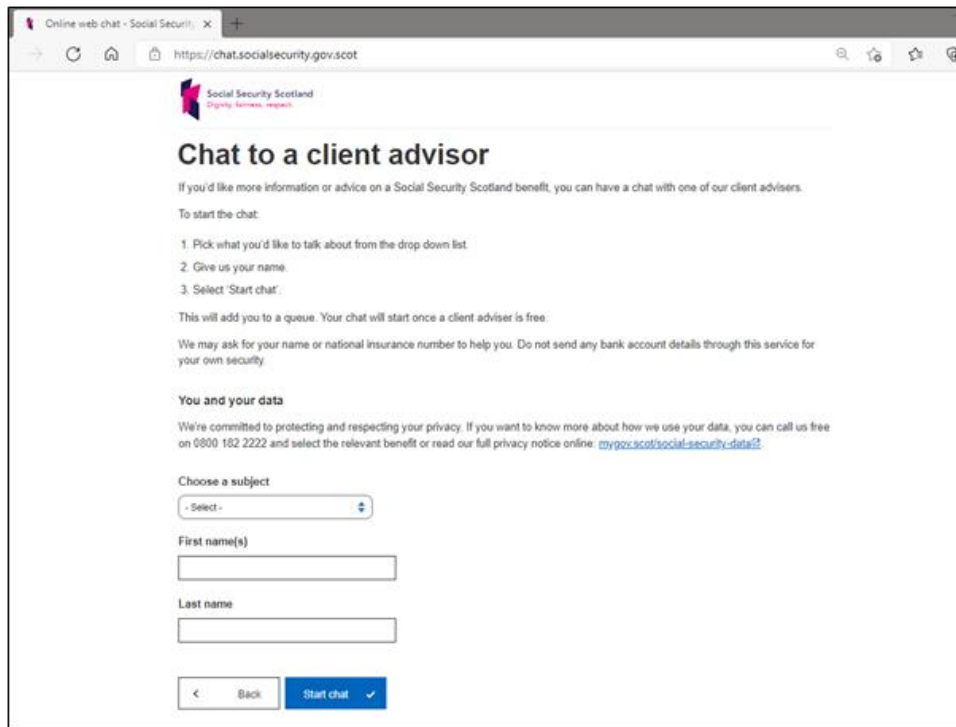
Table B7: Why are you unlikely to use the web chat service?* (n=17)

Response options	
I prefer to communicate with Social Security Scotland in another way (e.g. phone)	8
I'm concerned about the safety of my personal information via web chat	3
I don't think I'd need to contact Social Security Scotland	3
Other	3

*Respondents could choose multiple answers.

9. Annex C: Images used in the survey

Homepage



Online web chat - Social Security Scotland

https://chat.socialsecurity.gov.scot

Chat to a client advisor

If you'd like more information or advice on a Social Security Scotland benefit, you can have a chat with one of our client advisers.

To start the chat:

1. Pick what you'd like to talk about from the drop down list.
2. Give us your name.
3. Select 'Start chat'.

This will add you to a queue. Your chat will start once a client adviser is free.

We may ask for your name or national insurance number to help you. Do not send any bank account details through this service for your own security.

You and your data

We're committed to protecting and respecting your privacy. If you want to know more about how we use your data, you can call us free on 0800 182 2222 and select the relevant benefit or read our full privacy notice online [mygov.scot/social-security-data?l](#)

Choose a subject

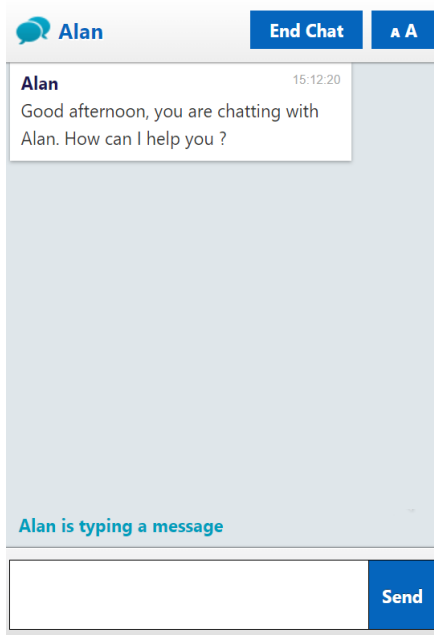
- Select -

First name(s)

Last name

Back Start chat

Chat window



Alan

End Chat

Alan

15:12:20

Good afternoon, you are chatting with Alan. How can I help you ?

Alan is typing a message

Send

How to access background or source data

The data collected for this report:

- are available in more detail through Scottish Neighbourhood Statistics
- are available via an alternative route
- may be made available on request, subject to consideration of legal and ethical factors. Please contact ResearchRequests@socialsecurity.gov.scot for further information.
- cannot be made available by Scottish Government for further analysis as Scottish Government is not the data controller.



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